

Creating a Medicaid/OPTUM Program Enrollment

This guidance is to set up the Program Enrollment, which will enable you to release encounters.

1. **Getting here:** Login, on the Navigation Pane (left menu) select **Client List** and search for your client. Select **Activity List**.
2. Select **Program Enrollment** from the navigation pane.

The screenshot displays the Idaho-WITS Training system interface. The top navigation bar includes the WITS logo, user information (User: Bastin, Crystal; Loc: Provider Training Agency, Treatment Location 1; Client: Rabbit, Jessica | 10604181000010E), and a Printable View icon. The left navigation pane lists various options, with 'Client List' highlighted. The main content area shows the 'Client Search' form with fields for Agency, First Name, SSN, Idaho-WITS Training Client Id, Unique Client Number, Treatment Staff, Case Status, and Other Number. A red circle with the number '1' is placed over the 'Activity List' link in the 'Actions' column of the 'Client List' table. Below this, the 'Client Activity List' table is shown with columns for Activity, Activity Date, and Created Date. A red circle with the number '2' is placed over the 'Program Enrollment' link in the left navigation pane.

Client Search

Agency: Provider Training Agency

First Name: [text box]

SSN: [text box]

Idaho-WITS Training Client Id: [text box]

Unique Client Number: [text box]

Treatment Staff: [dropdown menu]

Case Status: All Clients [dropdown menu]

Other Number: [text box]

Include Only Active Consents: Yes [checkbox]

Facility: [text box]

Last Name: Rabbit

DOB: [text box]

Provider Client ID: [text box]

Primary Care Staff: [text box]

Intake Staff: [text box]

Number Type: [text box]

Client List (Export)

| Unique Client # | Full Name | DOB | SSN | Gender | Actions |
|-----------------|-----------------|----------|-------------|--------|---|
| 10604181000010E | Rabbit, Jessica | 6/4/1981 | 000-00-0000 | Male | Profile Activity List Delete Record Linked Consents |

Client Activity List

| Activity | Activity Date | Created Date |
|------------------------------|---------------|--------------|
| Client Information (Profile) | 6/30/2014 | 3/21/2014 |
| Intake Transaction | 6/30/2014 | 6/30/2014 |

3. Select **Add Enrollment**.
4. Select Adult Medicaid or Adolescent Medicaid for the **Program Name** and complete the other yellow fields.
5. Select **Finish**.

This screenshot shows a table with columns: Start Date, End Date, Facility, Notes, and Actions. In the Actions column, there is a button labeled 'Add Enrollment' with a red circle and arrow labeled '3' pointing to it. A 'Printable View' icon is in the top left, and a 'Logout' link is in the top right. A 'Finish' button is located at the bottom right of the table.

This screenshot shows the 'Program Enrollment Profile' form. The form includes a sidebar menu on the left with options like 'Home Page', 'Agency', 'Group List', 'Clinical Dashboard', 'Client List', 'Client Profile', 'Gain Short Screener', 'Eligibility Screener', 'Benefit Application', 'Linked Consents', 'Non-Episode Contact', 'Activity List', 'Intake', 'Vital Signs', 'Fee Determination', 'Drug Testing', 'Wait List', and 'Screening'. The main form area has fields for: Facility (Treatment Location 1), Days on Wait List (0), Start Date (8/30/2014), Program Name (Adult Medicaid), Program Staff (Bastin, Crystal), BPA Authorization #, Termination Reason, and Notes. A red circle and arrow labeled '4' points to the Program Name field. A red circle and arrow labeled '5' points to the 'Finish' button at the bottom right. There are also 'Cancel' and 'Save' buttons next to the 'Finish' button.